



State of Montana Project Management Office

Project Initiation and Planning Phase

Project Vision Instructions

This is a 1-2 page document created by a team in the early days of a project to build the case for doing a project, negotiate the overall scope and requirements at the highest customer-focused level, and obtain team alignment and capture their agreement on the project definition.

This document is similar to other formats which define the high-level goals of a project, which include Project Charter, Project Scope Statement, Project Objectives Statement and Statement of Work. The Vision outline provides the strongest treatment of the project's customers and the benefits to be brought to them as the basis for the high level goals and scope of the project.

Early vision-level work helps to flesh out the project definition BEFORE the team descends into defining detailed requirements.

It allows an organization to quickly see if there is alignment on what is most important for the customer. It helps guard against scope creep by making sure that project goals are defined in terms of who the customers are and what benefits the project absolutely must provide to those customers.

It gives the team a basis for early investigation work so they can understand the effort and resources required to deliver what the draft visions are asking for.

It then allows the team to discuss possible tradeoffs on scope, schedule and resources at this high level and define a doable project that will still meet critical customer requirements.

During the project, it helps make sure everyone is staying true to the project's goals.

- If desired, draft a Vision in the early concept phase of your project to crystallize business or driving customer justification for the project, as well as any first take on major scope parameters (schedule, costs and implementation assumptions).
- Hold a team vision meeting with representatives from all cross-functional groups early in the initiation phase once the full team has been formed. Create the sections of the document (if a vision has not yet been started) by brainstorming bullet items onto flipcharts. If a draft vision exists, review it with the team, then discuss, edit and expand it together. Record open issues and assign actions to resolve them.
- Have the team then go and investigate alternatives for fulfilling customer needs.

- Revise the document iteratively as design alternatives are reviewed and feature decisions made.
- At the end of the kickoff or investigation phase, this document is the contract for the project, documenting what the team has agreed to accomplish and why.
- Use the Project Vision as a major starting point for any more detailed product requirements, specifications or detailed hardware, software, or process specs. Alignment at the vision level is achieved by focusing on customers and benefits, without delving into minute specification details. Then the vision can drive the further detailed spec work.
- Keep the document visible throughout the project so that it guides all more detailed design work and keeps the main goals at the forefront to help ward off scope creep. Refer to the document at every design review and major project status review. Is your project work still on track with what the Project Vision calls for?

Administrative Information

Revision	Author	Date	Sections Affected	Change Summary
1.0		1/2/2009		

Current Version	1.0
Date	1/2/2009
Master Document Chapter Number	4
Document ID	150